How to use promotion stages correct

This guide provides a brief explanation of how to use the different promotion stages in effectmanager.

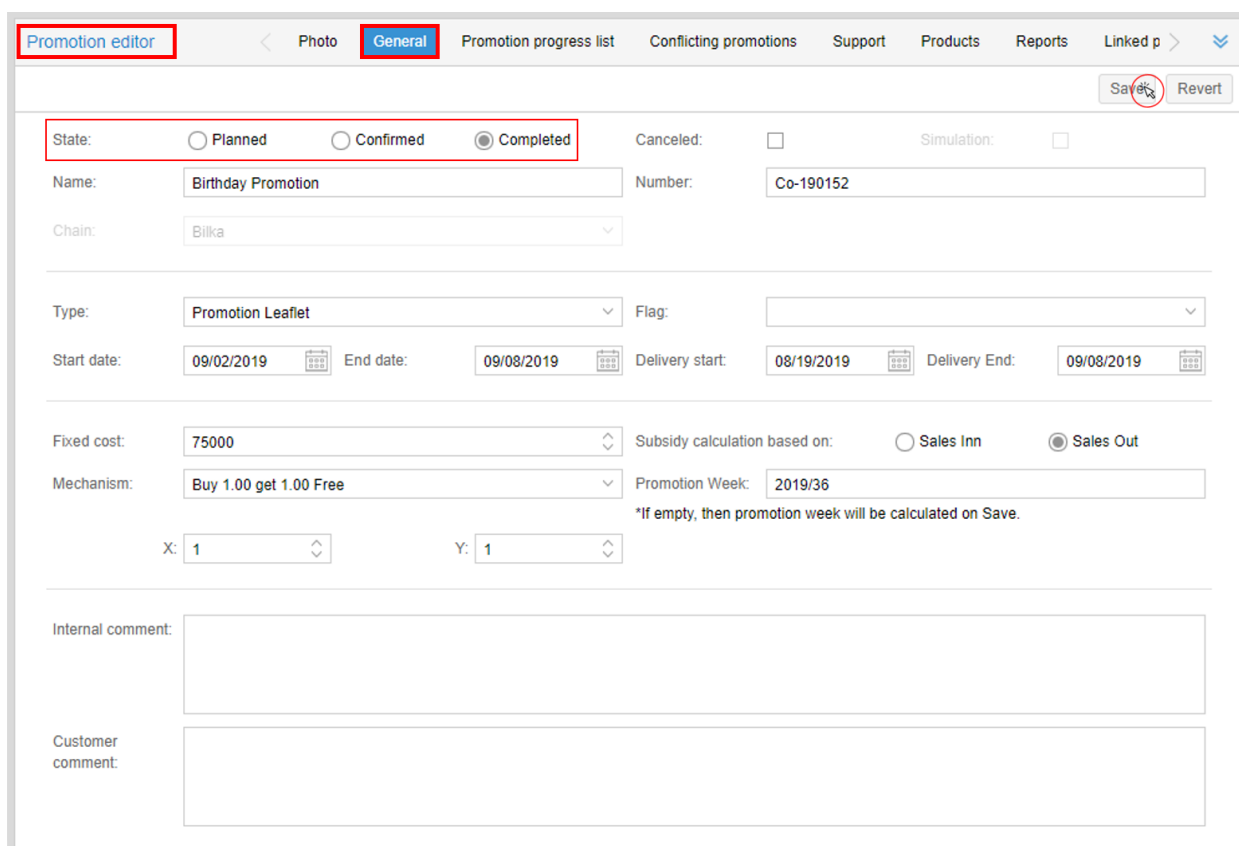*This guide is only of relevance if you have the promotion module in effectmanager.*

In effectmanager promotions can have three different stages: **Planned, Confirmed** and **Completed**.
In addition to this, you can make a promotion simulated or canceled.
Below we will go through the different promotion stages in effectmanager.

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Promotion stages are changed in Promotion Editor in the General tab.

👍 **Pro tip:** If your customer needs an overview of your promotions, this can be done using effectmanager. Simply filter your promotions on stage and wholesaler, and you will get a list, that you can send to your customer. You can either use the export function in the Promotion Scheduler List view or the Promotion Calendar in Reports.

Planned Promotions

When creating promotions in effectmanager, it is by default created at the stage Planned. Use this stage for promotions, that are planned but not confirmed by customers.

👍 **Pro tip:** The promotion stages should be updated in effectmanager when they are confirmed and then completed. As the promotion stage is central in reporting, this update should be part of your internal promotion process.

Confirmed Promotions

When your customers have confirmed the promotions, use this stage in effectmanager.
If you agree on promotions volumes with your customer, it is in this stage you can input the volumes confirmed for the promotion. The volumes you input in this stage will be saved at the planned stage.

If you need a guide, that shows your how to use Sales out in effectmanager, please see our guide How to use sales out in effectmanager

Completed Promotions

When a promotion is completed, make sure to update the promotions, as completed, in effectmanager.

Sales out are only updated on promotions that are marked as completed before the biweekly POS integration. Sales out will be updated on completed promotions if the following is true:

- POS data for the wholesaler is uploaded to effectmanager.
- The biweekly POS integrations have run the night to Wednesday and Friday.

  If you need a guide with more information about the POS integration, please see our guide [How sales are automatically updated on completed promotions](#)

👍 **Pro tip:** Make the updating of promotion stages in effectmanager a part of your routines regarding promotion planning.

Automatic Update of Promotion stages

effectmanager offers the options to make a setting for you, that automatically updates the promotion's stage from Confirmed to Completed when the following is true:

- Completed Stage
- Period is completed

The automatic change in the promotion stage will run every Sunday at midnight.
This means that promotion's stages will be changed before the Bi-weekly POS integration that imports Sales Out to Completed promotions.

If you need a guide with more information about the POS integration, please see our guide [How sales are automatically updated on completed promotions](#)

An example of the above:

- Promotion for Bilka Week 06 (31/01-06-02) is in the Confirmed stage in effectmanager.
- On Sunday, February 9th the automatic update will change the promotion stage for Bilka Week 06 promotion to completed.
- On Tuesday, February 11th at 23:00, the POS integration will import POS sales from Bilka to the completed promotion in effectmanager.

👍 If you are interested in the automatic update of promotion stages - please contact effectmanager at support@effectmanager.com

Other promotion stages

Simulated Promotions in effectmanager you can use to test different promotion scenarios. These simulations can be used to see how promotions will affect the overall economy. A simulated promotion will not be part of the reports and results overview.

Canceled Promotions in effectmanager provides you with the opportunity to cancel a promotion. A canceled promotion is still part of the reports and results overview in the stage where it was saved as canceled. By canceling promotions instead of deleting promotions, you can compare a planned period with a completed period.